

PI/TV TRAVEL CONVERSION STUDY

Final Report of Findings

our study # 6-439

September, 1997

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For:
Travel Montana
and
Wendt Advertising

our study # 6-439

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NOTES TO THE READER

REVIEW THE QUESTIONNAIRE

A copy of the questionnaire is included in the Appendices. Readers are encouraged to review it before reading this report. The question numbers have been included in the graphs for easy reference to the questionnaire, but to improve readability, the graphs include paraphrased, more readable versions of the questions and answer categories.

UNDERSTAND THE STATISTICAL INDICATORS

Statistical tests (t-tests, f-tests, and ANOVAs) were performed on the data to uncover findings related to group differences and trends. Statistical indicators called "*p*"-values are used in the text of this report to indicate the statistical significance of these findings. The smaller the "*p*" value, the more statistically significant the test result. The "*p*" value measures the reliability of the result, estimating the probability that the outcome has occurred by random error or chance.

A "*p*" value of .05 or smaller is considered statistically significant, with smaller values connoting more reliable effects. If the text indicates that a finding is "significant," but does not report a particular "*p*"-value, that means that the finding is significant at the $p < .05$ level.

Occasionally, analyses will be conducted to determine the difference between groups of variables. In this case, a number of "*p*" values will be indicated and denoted as "*ps*".

HIGH VALUES REFLECT MORE POSITIVE RESPONSES

The interview contained a mixture of response scales. For some, the lowest value (e.g., 1) represents the most positive response (e.g., "yes"), and for others the highest value (e.g., 5) represents the most positive response ("extremely important" or "extremely satisfied"). To enhance interpretation ease, ALL responses are recoded after data collection so that the highest scale value represents the most positive response. This "reflection" process does not alter the data, but makes interpretation more consistent with the verbal description of the findings.

PAY ATTENTION TO THE "Ns"

When evaluating the results, take into consideration the total number of respondents who answered the question. The percentages and means derived from small sub-samples are less stable than from larger samples or "Ns." Nonetheless, statistical tests take strongly into account the "N;" therefore, a significant finding of $p < .05$ is as reliable for a small sub-sample as for a large "N."

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EXECUTIVE SUMMARY

The purpose of this study was to assess the overall effectiveness and efficiency of the Summer 1997 Travel Montana Per-Inquiry television advertising campaign by comparing the effectiveness of Per-Inquiry television advertising with network advertising in the Minneapolis market and comparing the effectiveness of Per-Inquiry television advertising in both traditional and distant markets.

MAJOR FINDINGS

The Per-Inquiry advertising campaign proved its worth in both conversion rate and economic impact to the state. Per-Inquiry advertising had a lower cost per traveler rate and provided a better return per dollar over ad costs than the network ads.

Given the limitations of travel to Montana – mainly time, expense, and distance – the conversion rates seen in this study can be considered very good. Those that did not travel to Montana cited a lack of time, lack of money, or other personal problems that prevented a vacation to any state.

Recollection for receiving the travel information material was irregular. Respondents in nearby states were more likely to remember receiving the travel information they requested than those in Florida, New York, and Texas.

PROFILE OF THE “TYPICAL” MONTANA VACATIONER

Based on survey data, a profile of the “typical” Montana visitor would show:

- ◆ They made their decision to travel **before** ordering travel information.
- ◆ The information helped to reinforce their decision to travel to Montana; in some cases respondents said the information resulted in a longer visit.
- ◆ They fit the Active Outdoor psychographic profile.
- ◆ Montana was their **primary** destination.
- ◆ The traveling party consists of two adults, 45 years of age or older, with moderate income, with no children.
- ◆ They were most likely to visit in the summer.
- ◆ Their average stay was about six overnights, usually in a motel or hotel.
- ◆ They spent about \$138 per day and almost \$800 per traveling party.
- ◆ If they had been to Montana in the past five years, they were more likely to have visited this past year.
- ◆ They were very satisfied with their most recent visit.

- ◆ They are very likely to return, probably in the next two years, and showed an interest in a future trip that followed the Lewis & Clark Trail.

INTRODUCTION

Travel Montana and Wendt Advertising wish to improve the performance of advertising for Montana tourism. This summer a relatively new type of advertising – Per-Inquiry (PI) television advertising – was used to entice potential visitors to Montana. In addition, a “traditional” ad campaign over network television was made for the Minneapolis market. The ads ran in the spring and summer, targeting a summer visit to Montana.

STUDY PURPOSE

The purpose of this study is to assess the overall effectiveness and efficiency of the Summer 1997 Travel Montana Per-Inquiry television advertising campaign. In order to do this effectively, we:

- compared the effectiveness of Per-Inquiry television advertising with network advertising in the Minneapolis market, and
- compared the effectiveness of Per-Inquiry television advertising in traditional markets with PI ads in distant markets.

We also examined the demographic and psychographic profiles of travelers and non-travelers to measure the effectiveness of the advertising campaign.

SURVEY METHOD

A computer aided telephone interviewing system (CATI) was used to conduct this study because of its quick turn-around time, accuracy and efficiency. Clearwater Research, Inc. uses a state-of-the-art Ci3™ CATI system developed by Sawtooth Software, Inc., and employs a staff of highly trained interviewers. Interviewers are thoroughly briefed prior to interviewing, are required to rehearse the questionnaire prior to conducting actual interviews, and are continuously monitored throughout the project.

THE SURVEY INSTRUMENT

The questionnaire used in this study was designed by Clearwater Research, Inc. in cooperation with Travel Montana and Wendt Advertising. Questions were designed to determine if the individual who requested the travel information visited Montana. If they did visit, they were asked a series of questions about their visit. If they did not visit, they were asked questions about why they did not travel to Montana. All respondents

were asked demographic and travel-related psychographic questions. A copy of the final questionnaire is included in Appendix C.

SAMPLING AND INTERVIEWING

The client provided two databases of potential travelers who called the 800-number for Travel Montana information. The first list contained names of those who were identified as having seen the Minnesota Network ad; the second list contained names of those who were identified as having seen one of the Per-Inquiry Cable TV ads. A phone matching service provided phone numbers for these lists.

The second list was separated into two groups – those from the 13 states in Travel Montana’s “traditional” market, and those from distant states. The 13 traditional market states include:

- California
- Colorado
- Idaho
- Illinois
- Michigan
- Minnesota
- Nevada
- North Dakota
- Oregon
- Utah
- Washington
- Wisconsin
- Wyoming

Of the remaining 37 states in the distant market category, only the three largest – Florida, New York, and Texas – were chosen for the study. For both these groups, quotas were established proportional to the ad-inquiry rate from the respondents’ home state.

The data described in this report were collected from September 9 through 24, 1997. Interviewing was conducted weekdays from 5:30 p.m. until 9:15 p.m., Saturdays from 10:00 a.m. until 4:00 p.m., and Sundays from 2:00 p.m. until 8:00 p.m. (all respondent’s local time). A total of 5,502 dialings were made to complete 930 interviews. The average length of the interview was about six minutes. The final call outcomes (final call dispositions) are listed in Appendix B.

FINDINGS

The conversion results from the survey are discussed first; then, characteristics of those who did and did not travel to Montana are reviewed. In general, results are shown in the order of the questions asked. Statistical tests (t-tests, F-tests, and ANOVAs) were conducted with the data to discover trends and significant differences among the respondents and among the responses. Those differences that are statistically significant are noted as such.

Overall Results are examined, as well as results in two groupings – the ad-type groups (Minnesota Network, Traditional PI, and Distant PI), and three targeted psychographic profiles for Travel Montana advertising (Active Mature, Active Outdoors, and Traditional Family). The primary quota cell, derived from the lists provided by the client, determined the ad-type groups. Survey questions 34 through 36 determined which of the three psychographic cells best fit the respondent. Of the 930 respondents, only one did not fit into one of the three cells.

INQUIRIES AND CONVERSION RATES

PER-INQUIRY ADS GENERATE THE BEST VALUE

In this section we examine the effectiveness of the ad campaigns in several categories:

- cost per inquiry,
- estimated conversion rate – the ability to generate travel to Montana,
- estimated cost per visitor, and
- estimated return over cost.

Table 1 shows the cost per inquiry for each of the TV ad-types and the estimated conversion rate from the survey. The conversion rate for the PI Traditional Ads compares very favorably to that of the Minneapolis Network Ads.

Table 1: Cost per Inquiry and Conversion Rate

Category	Ad Costs	Total Responses	Cost per Inquiry	Conversion Rate	Estimated Visiting Parties	Cost Per Visiting Party
NETWORK TV ADS	\$246,000	4,815	\$51.09	37.0%	1,782	\$138.08
PER-INQUIRY ADS (total)	\$218,238	19,552	\$11.16	16.3%	3,182	\$68.58
Traditional PI		4,820	\$11.16	27.2%	1,311	\$41.03
Distant PI		3,645	\$11.16	12.7%	463	\$87.87
Not Surveyed PI		11,087	\$11.16	12.7%	1,408	\$87.87

NOTE: The *Not Surveyed PI* represents the remainder of the distant market states that were not

included in the study. These figures are averages and estimates based on the distant markets that were surveyed, and are designed to be conservative.

The Per-Inquiry ads drew about four times the number of 800-number inquiries as did the Network ads. The cost-per-inquiry for PI ads is lower; but more important, the conversion rate (overall) is about half that of the Minneapolis network ads. That's good, for once the conversion rate is applied to the number of responses, the PI ads show more estimated visiting parties and a lower cost per visiting party.

Table 2 shows estimated values for cost per visitor and return over cost by the ad types. Again, we see that PI advertising provided the lowest cost per visiting party and best return per dollar (over the costs of the media).

Table 2: Costs and Return Per Visiting Party

Category	Cost Per Visiting Party	Average Overnights Per VP	Ave Amt Spent Per Night	Ave Amt Spent Per VP	Estimated Total Return	Rate of Return Over Ad Costs
NETWORK TV ADS	\$138.08	5.34	\$134.41	\$717.75	\$1,278,706	519.80%
PER-INQUIRY ADS (total)	\$68.58	6.31	\$142.22	\$897.26	\$2,881,191	1308.25%
Traditional PI	\$41.03	5.20	\$134.05	\$697.06	\$913,908	1698.93%
Distant PI	\$87.87	8.23	\$156.32	\$1,286.51	\$595,558	1464.04%
<i>Not Surveyed PI</i>	\$87.87	6.71	\$145.19	\$974.22	\$1,371,725	1108.66%

NOTE: The average amount spent per visiting party is calculated by multiplying the average amount spent per day times average overnights per trip.

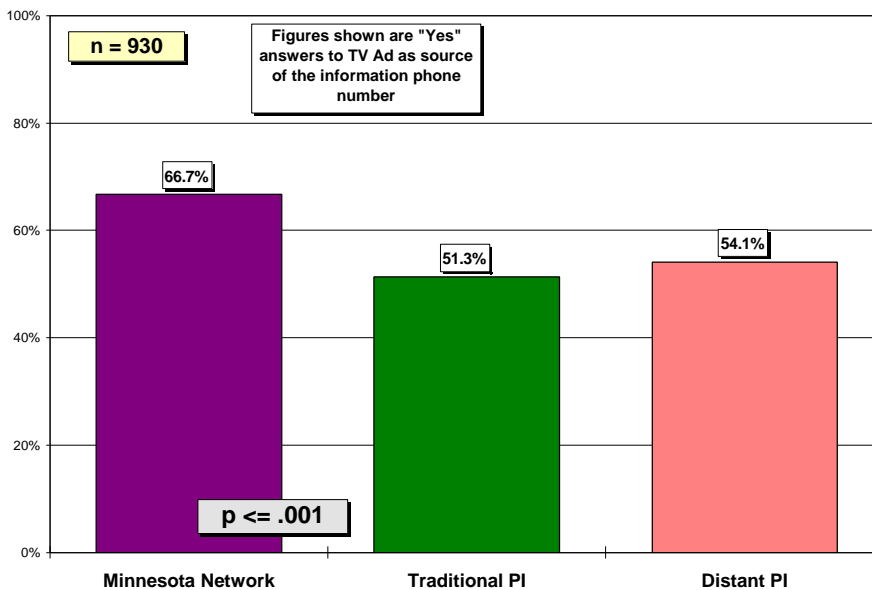
The last column – rate of return over ad costs – shows PI ads provided the best “bang for the buck.” Of course, the traditional markets fared better than the distant markets because of the higher conversion rate (which could be expected), but distant market visitors stay longer and spend more. It may be that distant visitors are more likely to make a longer/stronger commitment to a Montana vacation than visitors from bordering states who may be passing through or vacationing in Montana as part of a longer multi-state vacation.

SPECIFIC MEDIA RECALL

NETWORK ADS RECALLED MORE OFTEN

In this section we examine the effectiveness of the various media according to the respondents' ability to recall the specific medium that prompted them to call for information.

Figure 1: Q2) What Prompted You to Request this Information?



Both travelers and non-travelers were asked what was the source of the phone number that prompted them to request the Montana travel information.

Two-thirds of the Minnesota Network respondents remembered it was from a *TV ad*; compared with slightly more than half of those responding to the PI ads.

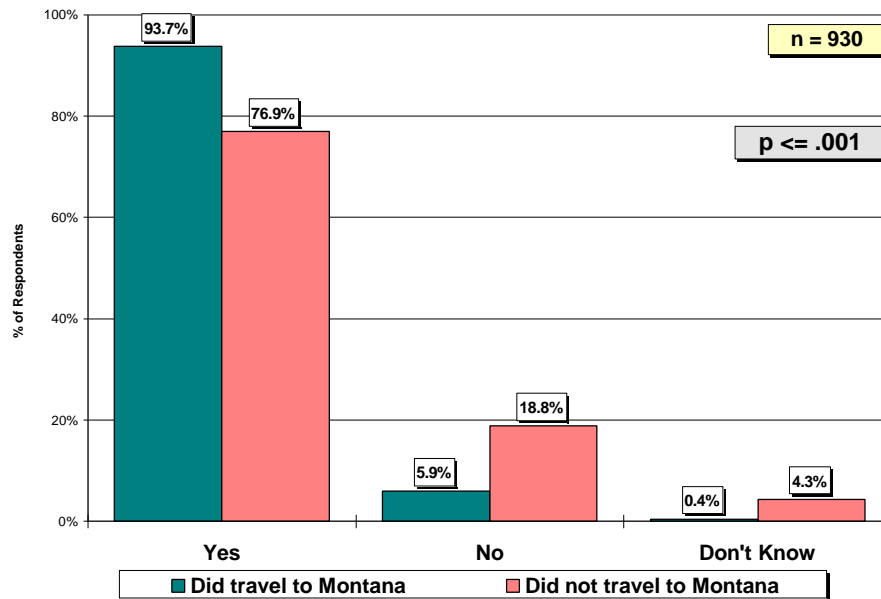
Magazine ads were mentioned next most often, followed by *"I don't remember."*

MONTANA TRAVEL INFORMATION AND ITS EFFECT

TRAVELERS GET THE INFO; MINNESOTA RESPONDENTS MOST LIKELY TO REMEMBER THEY GOT IT

In this section we look at whether respondents remember receiving the information they requested and how that differs among the three TV ad types.

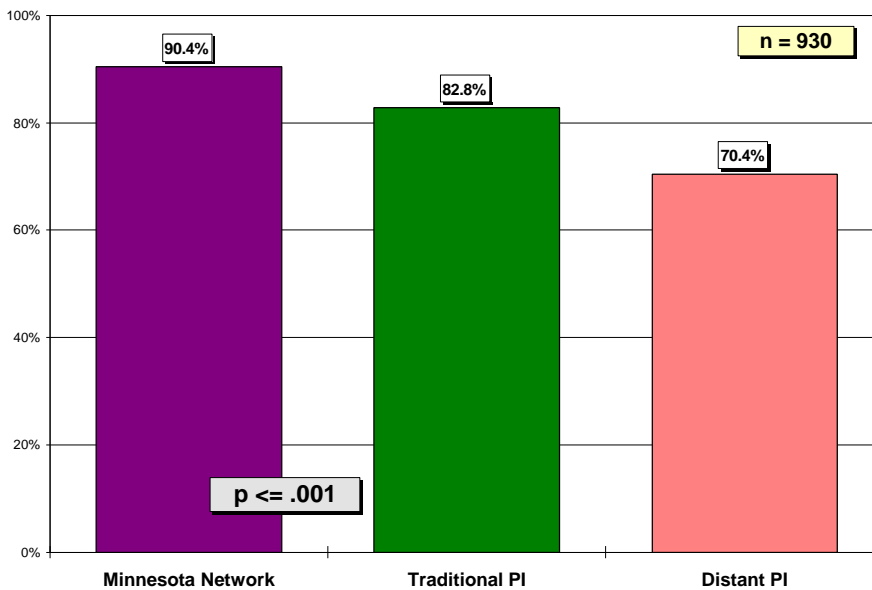
Figure 2: Q3) Did You Receive the Information You Requested?



Overall, slightly more than 80% of respondents remembered they received the information they requested.

Those who traveled to Montana were more likely to have remembered receiving the information (94%), compared to just three-quarters of the non-Montana visitors.

Figure 3: Receiving the Information by Group



Those who called after seeing the Minnesota Network ads were most likely to remember receiving the information, and they had the highest conversion rate.

Traditional PI viewers were the next most likely to remember, and they had the next highest conversion rate.

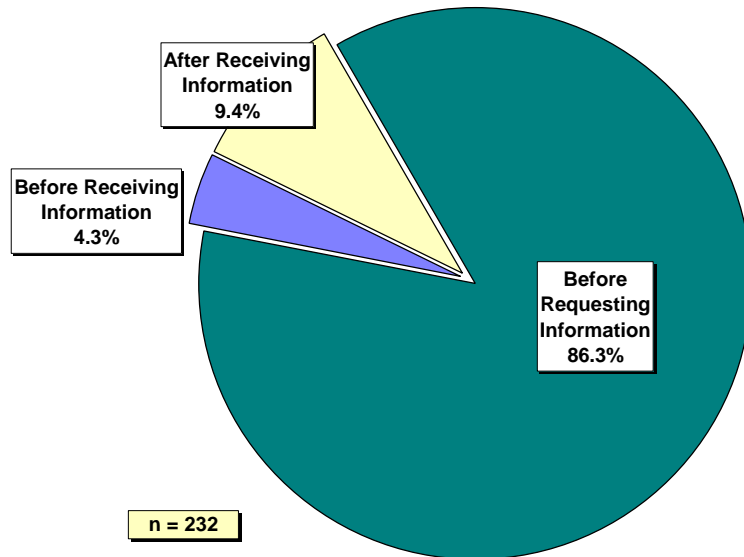
Distant PI markets were last in both categories.

Although there were only a few respondents who mentioned that not receiving the information played a part in their decision **not** to travel to Montana, we find it curious that such a relationship exists between the three groups. Why did those in Florida, New York, and Texas remember receiving the information at such a lower rate than those in the 13 traditional states, or those in Minnesota? An explanation could be that the information **was** received, but was not as memorable to those in the distant markets, who traveled to Montana in smaller numbers.

THE DECISION TO TRAVEL MADE BEFORE THE REQUEST; THE INFORMATION DOES AFFECT LENGTH OF STAY

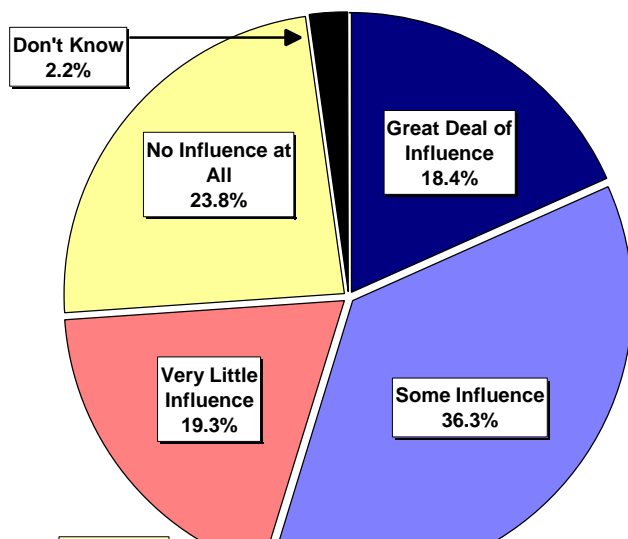
In this section we examine the decision-making process of those respondents who visited Montana, and the impact the information they received had on their travel plans.

Figure 4: Q7) and Q8) Did You Decide to Travel to Montana Before or After You Requested/Received the Information?



The majority of travelers had made the decision to come to Montana **before** they requested travel information; slightly less than 10% were influenced to travel to Montana after they received the information.

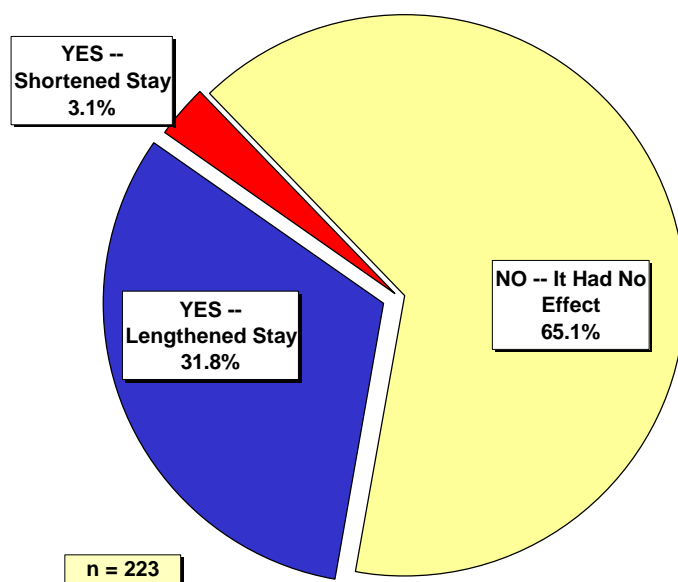
Figure 5: Q9) How Much Influence Did the Information You Requested Have on Your Decision to Visit Montana?



More than half said that the information they received had *some or a great deal of influence* on their decision to visit.

Less than one-quarter said the information had *no influence at all*.

Figure 6: Q10) Did the Information you Received Influence the Planning of the Length of Your Stay for Your Vacation in Montana?



Almost one-third of travelers said that their vacation stay was **extended** because of the travel information they received.

In summary, while the decision to travel to Montana was usually made **before** the request for information, the receipt of that information has a strong impact. Those who traveled to Montana had a higher rate of remembering that they received the information, so the information can be seen as **reinforcing** their decision to travel to Montana. In addition, more than half said the information had some or a great deal of

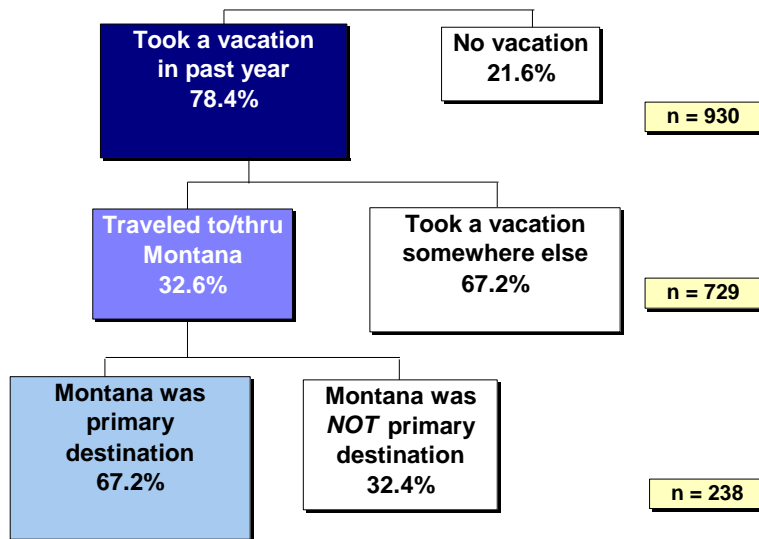
influence on their travel plans, and one-third said their stay was **extended** because of the information received.

MONTANA TRAVELER DEMOGRAPHICS AND PSYCHOGRAPHICS

ONE-THIRD OF THOSE WHO TOOK A VACATION CAME TO MONTANA; SIGHTSEEING WAS THE REASON

In this section we look at the respondents who said they traveled to or through Montana, whether Montana was their primary destination, and the purpose of their trip.

Figure 7: Q4-Q6) Did You Take a Vacation? In Montana? Was Montana Your Primary Destination?

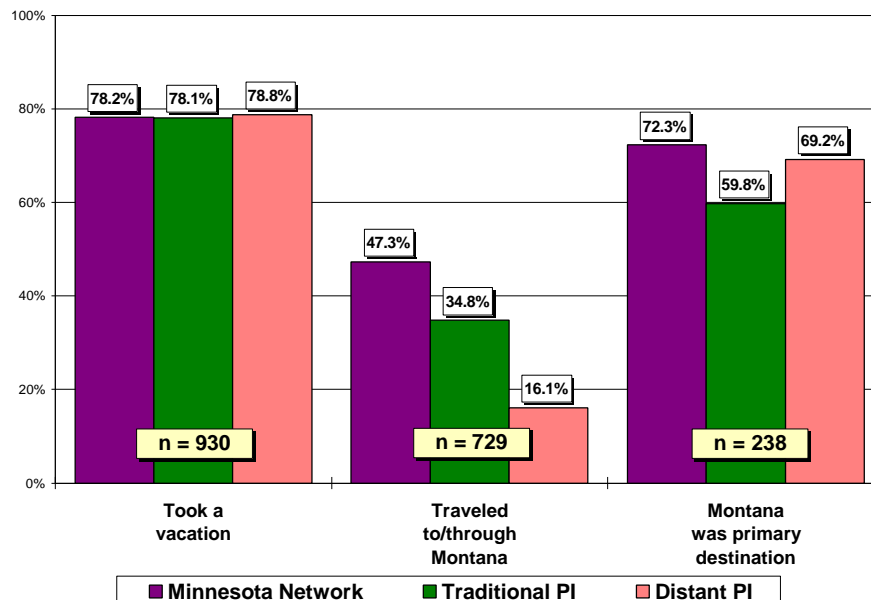


The majority of the respondents took a vacation in the past year; of those who did, about one-third included Montana in their travel plans.

Of the 238 respondents who did travel to Montana, more than two-thirds said that Montana was their **primary** destination.

However, as we discovered earlier, the conversion rate for the three TV ad types varied. Almost half of the Minnesota Network inquiry-respondents said they traveled to or through Montana, slightly more than one-third of the Traditional PI respondents did likewise, and just 17% of the Distant PI respondents traveled to or through Montana.

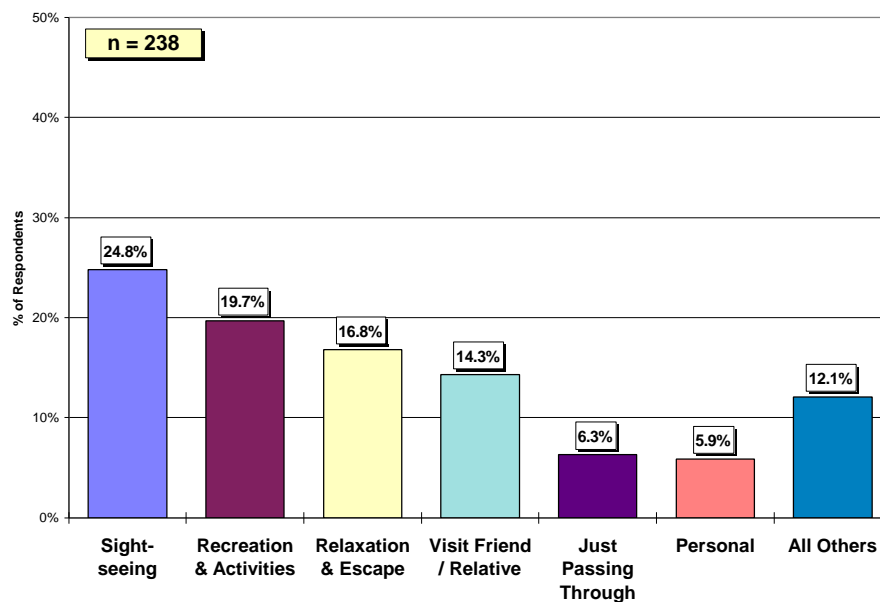
Figure 8: Travel Inclination and Purpose by Group



Distant PI travelers were slightly more likely than the Traditional PI group to say that Montana was their primary destination.

This makes sense as members of this group would have farther to travel to get to Montana and would not be as inclined to be *just passing through*.

Figure 9: Q20) What was the Primary Purpose of This Trip?



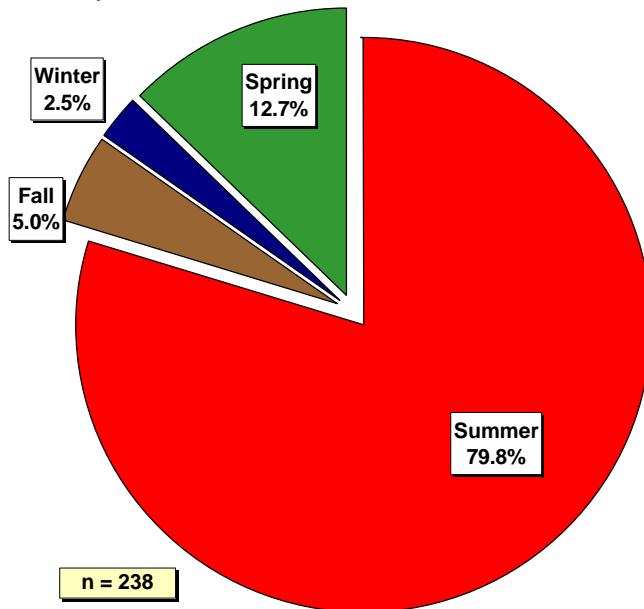
Of those who visited Montana, *Sightseeing* was the most-often mentioned purpose of travel (about one-third of all mentions).

Recreation and Activities, Relaxation and Escape, and Visiting Friends and/or Relatives were mentioned next most often.

SUMMER WAS THE MOST POPULAR SEASON; MOST TRAVEL BY CAR

In this section we look at when travelers visited Montana and how they got there.

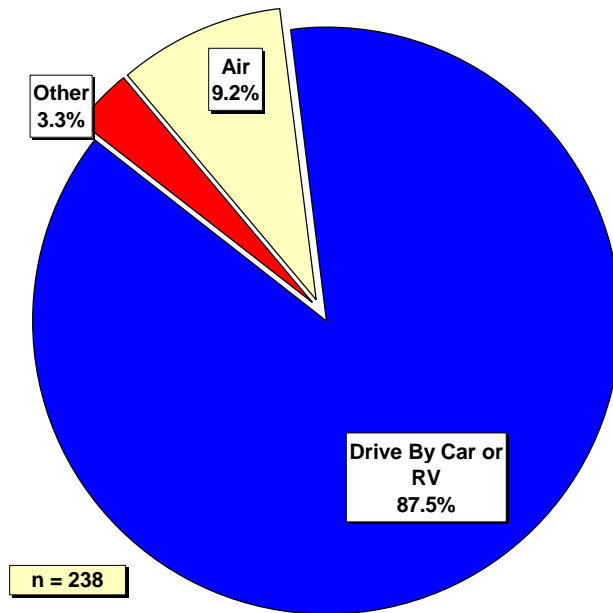
Figure 10: Q21) In Which Season Did You Visit?



Almost four-out-of-five of those who visited Montana said their most recent trip was in the *Summer*; *Spring* accounted for about 13% of all visits.

This would be expected since the campaign was geared towards bringing warm season travelers to Montana.

Figure 11: Q22) Form of Transportation Used to Visit Montana



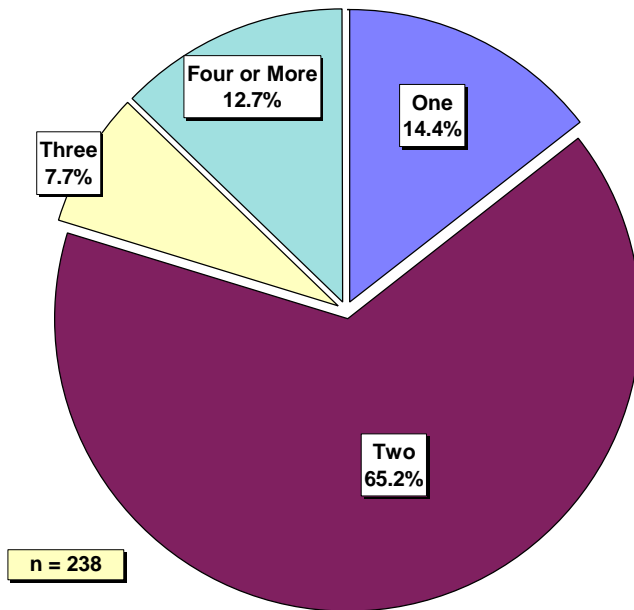
Most travelers came by *Car or RV*, a not surprising result given that the majority of travelers came from nearby states.

Even in the Distant PI states of Florida, New York, and Texas, more than 70% of travelers came by car – only 28.2% said they came to Montana by air.

DEMOGRAPHICS – TWO ADULTS, NO KIDS

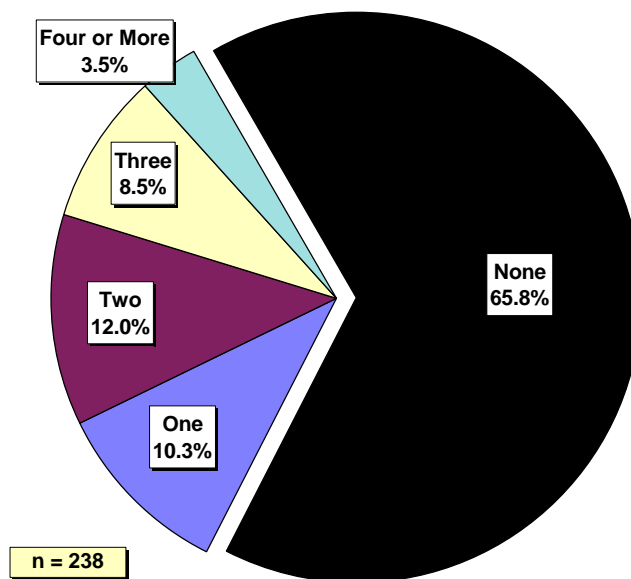
In this section we look at the family composition of the visiting parties. We also examine the age and income demographics of vacationers.

Figure 12: Q23) How Many Adults Were in the Traveling Party?



About two-thirds of the respondents who visited Montana said their traveling party consisted of two adults.

Figure 13: Q24) How Many Children Were in Your Traveling Party?

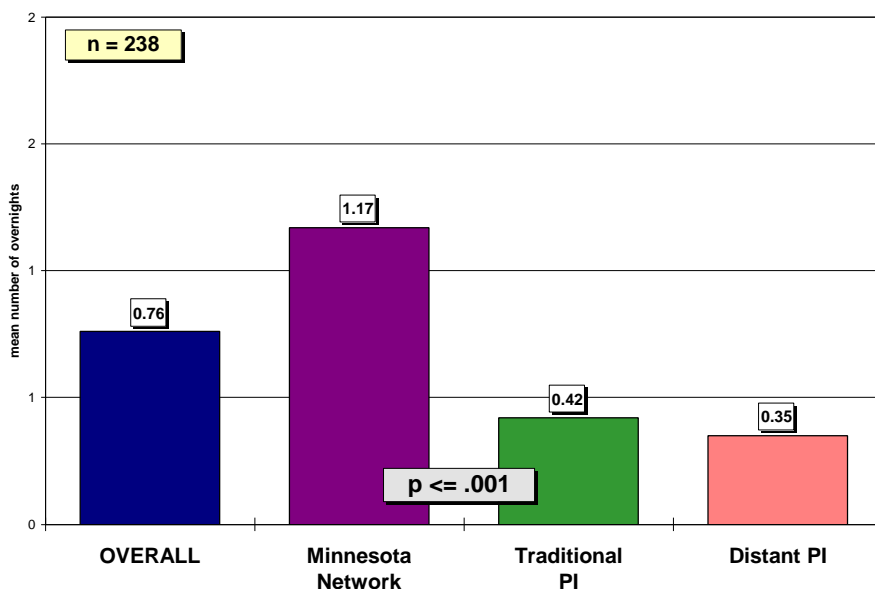


Two-thirds of all respondents said there were no children in their traveling party.

Slightly less than half of all traveling respondents were in the “two adults, no kids” combination category. Another 10% traveled alone.

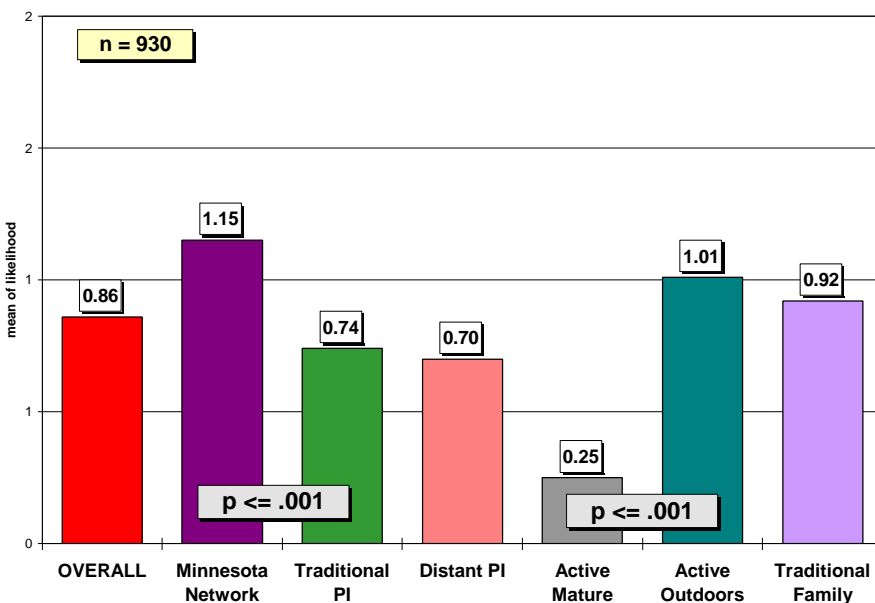
There were differences in the make-up of the traveling party according to the ad-types and the psychographic descriptors.

Figure 14: Average Number of Children in Party by Ad Type



Minnesota Network respondents were the most likely to have children with them; in both PI groups more than three-quarters of respondents had no children in the traveling party.

Figure 15: Q51) Average Number of Children Living at Home



Travelers in the Active Mature psychographic were mostly adults with no children (almost 90%), but the other two groups were equally likely to travel with children.

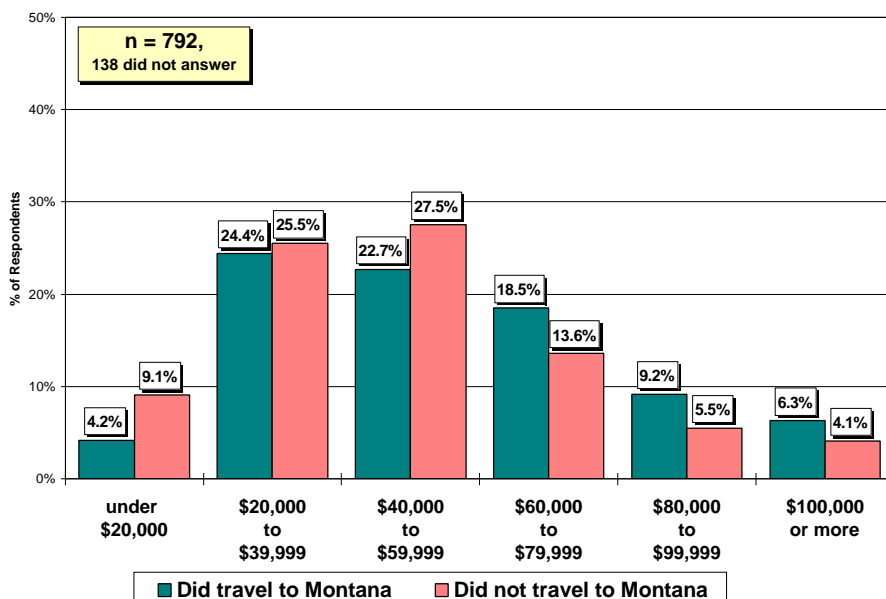
This is probably because of the similarity of the demographics of these two groups (as seen in the answers to Q51 at left).

In other words, even those who fit the Active Outdoors psychographic description are just as likely as are those in the Traditional Family psychographic to include children in their travel plans.

The average age for all travelers to Montana was 48, the same age as those who did not travel to Montana. Of course, the Active Mature group's average age was higher than the other two psychographics (since age was a determinant in defining the groups) but there was no difference between the other two groups. Those from the Minnesota Network group were younger (45) than the Traditional PI group (49) and the Distant PI respondents (50).

Annual Household income is always the last question asked primarily because so many respondents do not like to give an answer. Of the 930 respondents in this study, about 15% did not give an answer to the income question.

Figure 16: Q54) Total Annual Household Income

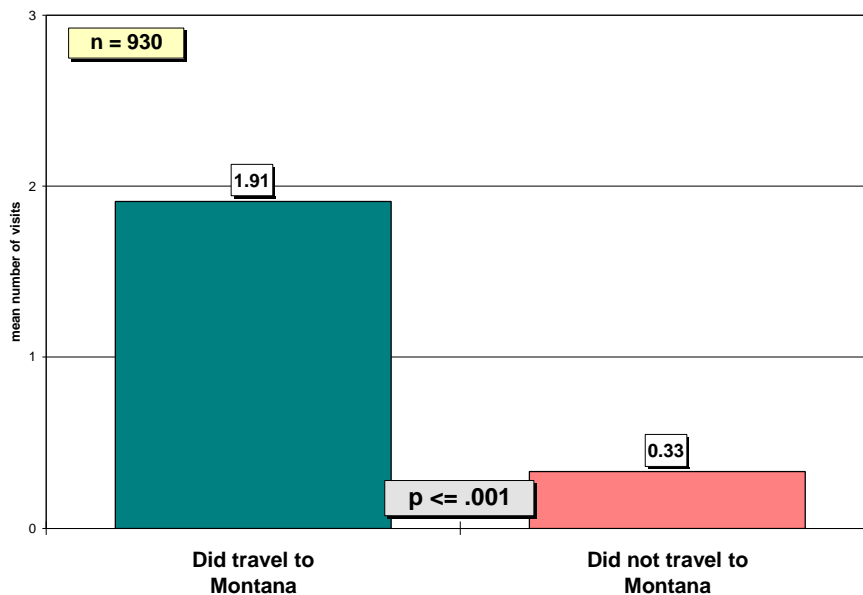


One-third said their total household income was in the \$20-\$39,999 range; another one-quarter were in the \$40-\$59,999 range.

BEEN THERE, DONE THAT – AND CAME BACK

In this section we look at respondents' previous travel history and its relation to traveling to Montana this year.

Figure 17: Q33) Average Number of Times Respondent Has Been to Montana in the Last 5 Years



Many travelers to Montana indicated that their visit was a **return** visit.

Almost 80% of those who did not travel to Montana said they had never been there; nearly 40% of those who traveled to Montana said they had been there at least twice.

DEMOGRAPHIC PROFILE OF THE TYPICAL TRAVELER

Considering the patterns discussed above, we can say that a “majority profile” of travelers to Montana looks like this:

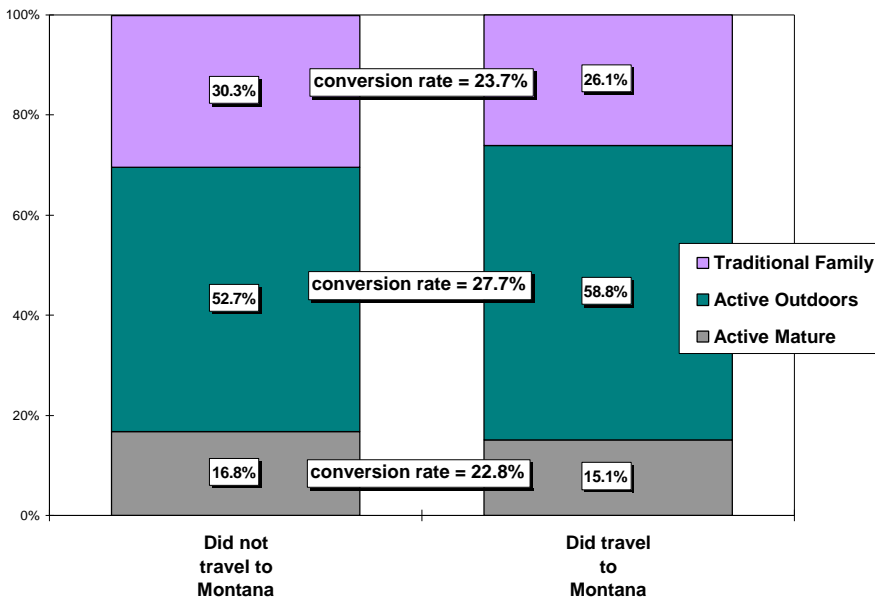
- two adults,
- average age in the upper 40's, with
- no kids,
- moderate income, and
- they've been to Montana previously.

Obviously, not all travelers fit this description. It is helpful to us in describing the type of traveler who is being targeted and who is actually traveling to Montana. However, we may learn more by looking at the psychographic profile of the Montana traveler.

WHO VISITS? ACTIVE OUTDOORS

In this section we look at the psychographic description of vacationers.

Figure 18: Psychographic Profile of Respondents and Travelers



More than half of all respondents and half of travelers to Montana fit the Active Outdoors psychographic profile, described as those looking for their ideal vacation as *“relaxation and adventure in a natural setting.”*

Their conversion rate was just slightly higher than the other two groups.

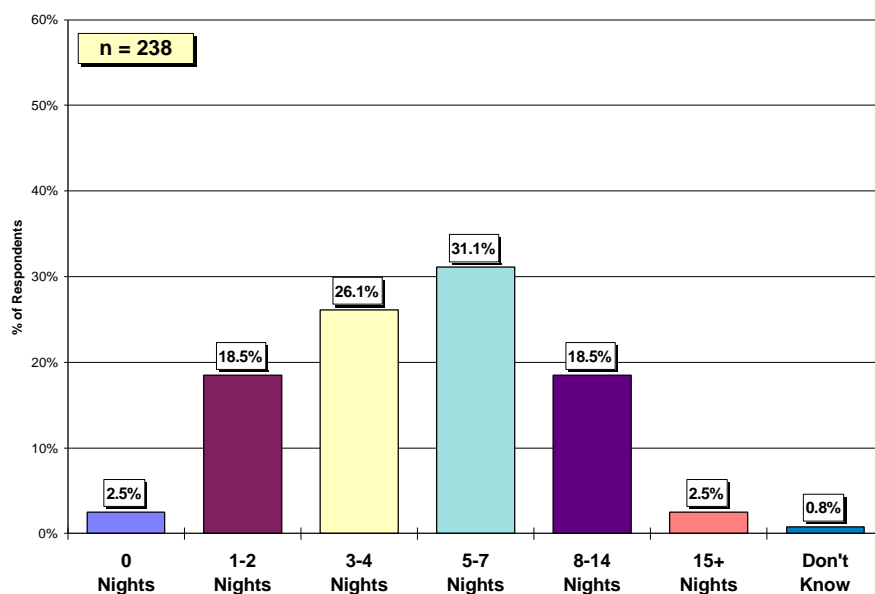
Nearly 60% of those who traveled to or through Montana fit the Active Outdoors psychographic. If we combine this knowledge with our demographic profile, we learn that while age, income, and family structure of the respondent are important, a better descriptor of the “typical” Montana traveler may be someone who actively enjoys the outdoors.

TRAVELER ECONOMICS

In this section we look at the overnight accommodation patterns and economic impact of Montana visitors.

TRAVELERS STAY FIVE NIGHTS... OR MORE

Figure 19: Q25) How Many Nights Did You Stay in Montana?

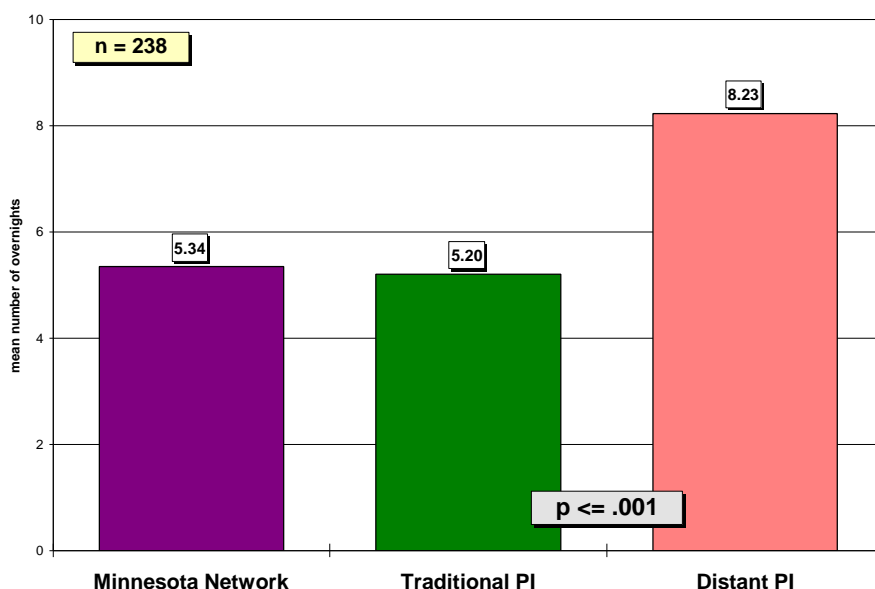


The average length of stay per visit was almost six overnights (5.77).

More than 40% said they stayed 5-7 nights; about one-quarter of travelers said they stayed 3-4 nights.

Another 19% said they stayed longer than a week.

Figure 20: Average Number of Overnights by Group

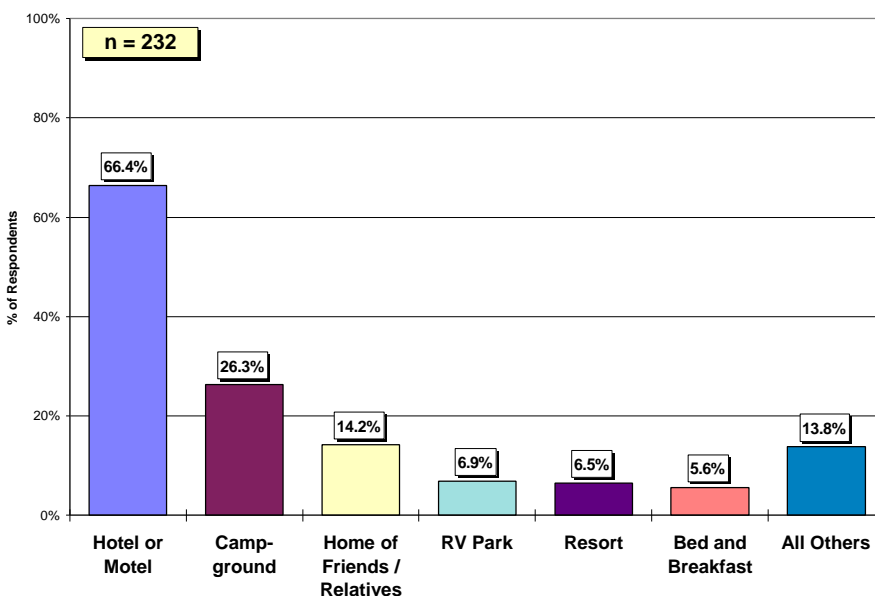


Travelers from the states of Florida, New York, and Texas (the Distant PI group) stayed much longer – about three days longer than the Minnesota Network or Traditional PI groups.

MOTELS AND CAMPGROUNDS

TRAVELERS STAY IN

Figure 21: Q26) What Accommodations Did You Use During Your Stay? (multiple response)



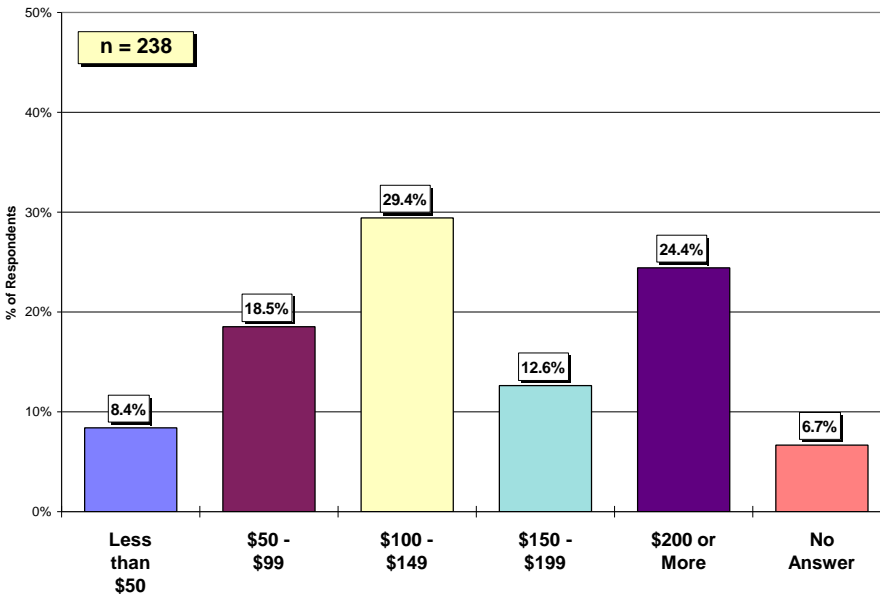
Hotels or Motels were the choice of the majority of travelers; *campgrounds* were next-most mentioned.

About 14% said they *stayed with friends or relatives*.

Active Outdoors respondents were more likely to mention *campgrounds* (34%) than Traditional Family travelers (21%) or Active Mature vacationers (6%).

VISITORS SPEND \$138 PER DAY PER PARTY, DISTANT PI TRAVELERS SPEND MORE

Figure 22: Q27) How Much Did Your Party Spend Per Day?

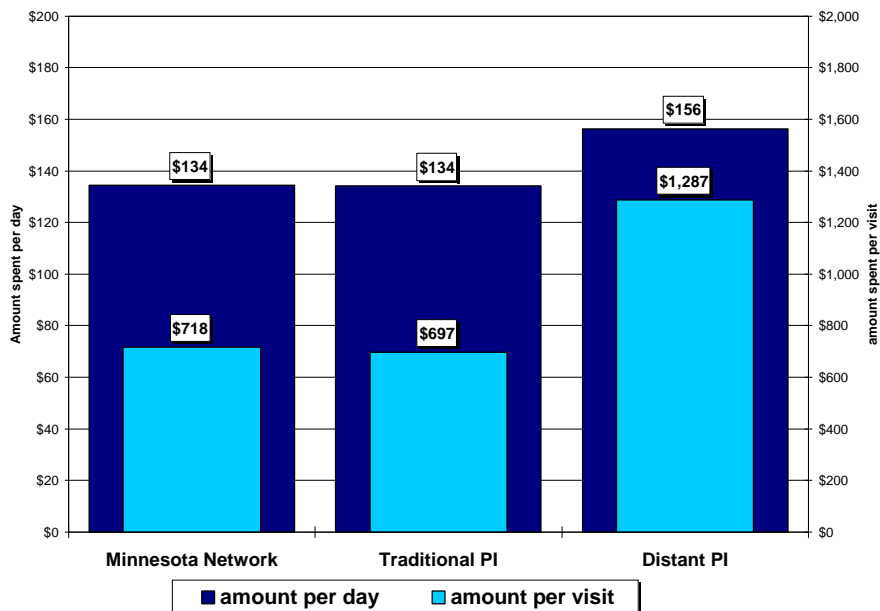


The average amount spent per party per day was slightly more than \$138 (\$138.03).

These figures include all expenses except travel-related expenses (such as airline fares and gas).

Combined with the average stay of 5.77 overnights, the overall average amount spent per visit was almost \$800 per traveling party (multiplying the amount spent per day by the number of overnights).

Figure 23: Average Amount Spent per Day/Visit per Group



Distant PI travelers spent more per day than the other two groups, although the amount is not statistically significant.

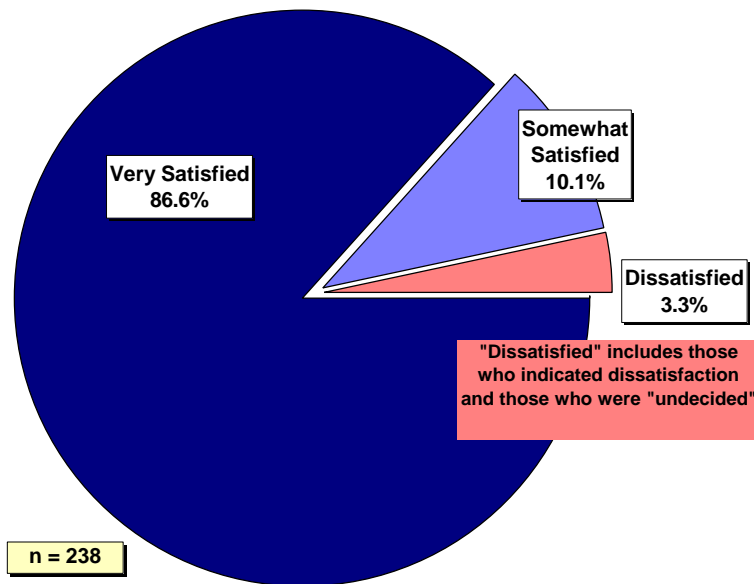
What **is** significant is the **total** amount spent per visit. Distant PI travelers spent more per visit than the other two groups.

FUTURE TRAVEL INDICATORS

In this section we look at the satisfaction level of travelers to Montana, their likelihood of returning, and their interest level in a Lewis-and-Clark Trail vacation.

MONTANA TRAVELERS SATISFIED; MOST WOULD RETURN

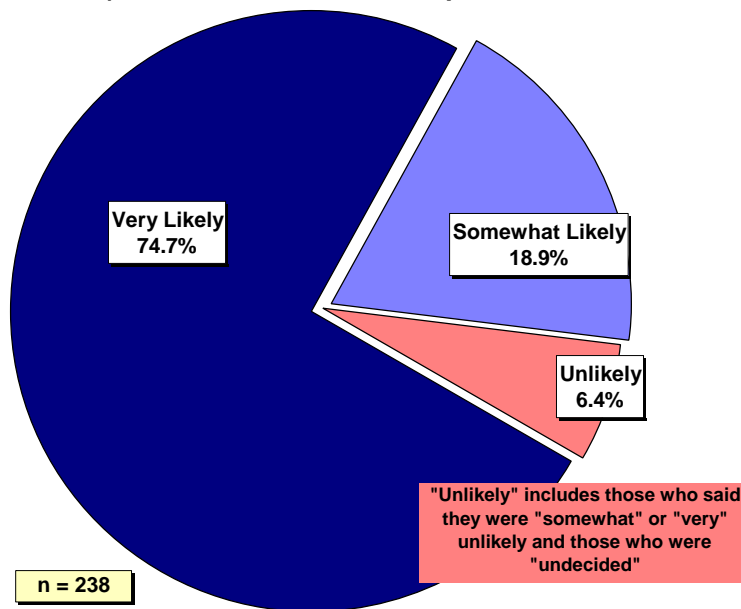
Figure 24: Q28) How Satisfied Were You With Your Trip?



The vast majority of respondents were *very satisfied* with their visit.

Slightly more than 3% indicated any dissatisfaction (or non-satisfaction) with their visit.

Figure 25: Q29) Likelihood of Another Trip to Montana



Almost three-quarters said it was *very likely* that they would take another trip to Montana.

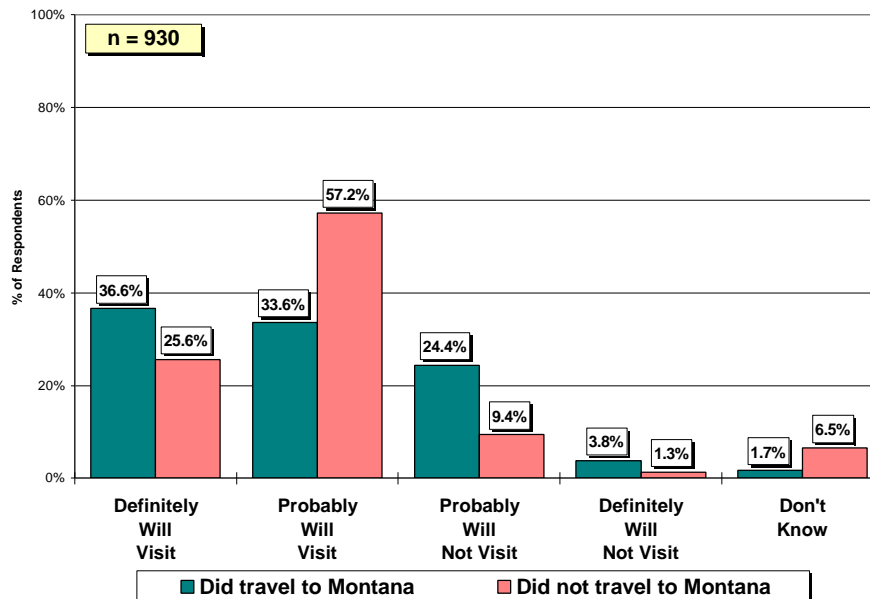
Just 6% thought it *unlikely* that they would return.

Based on these answers, and the fact that those who traveled to Montana indicated they had visited Montana in the past, it would appear that those who have been here were satisfied and **proved** it by returning for another visit.

VISITING MONTANA -- IF NOT NOW, SOON

In this section we examine future travel plans of visitors and non-visitors, including the likelihood of taking a trip related to the Lewis & Clark Trail.

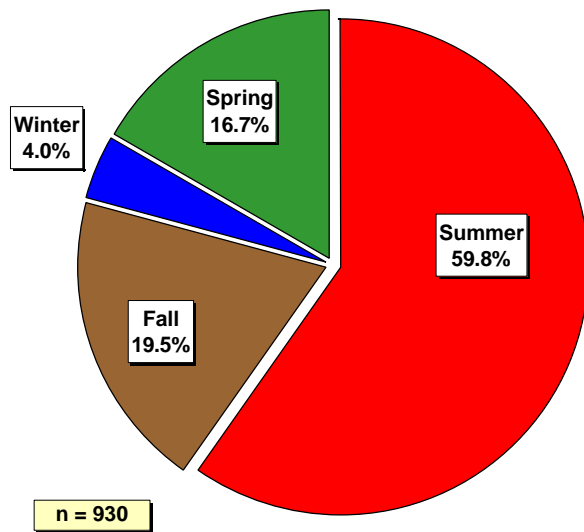
Figure 26: Q31) In the Next Two Years Would You Say You...



When asked if they would visit Montana in the next two years, almost 80% of both visitors and non-visitors said they intend to visit.

Those who did not travel to Montana this year have a slightly **higher** likelihood of intending to make the trip in the next two years than those who did visit Montana this year.

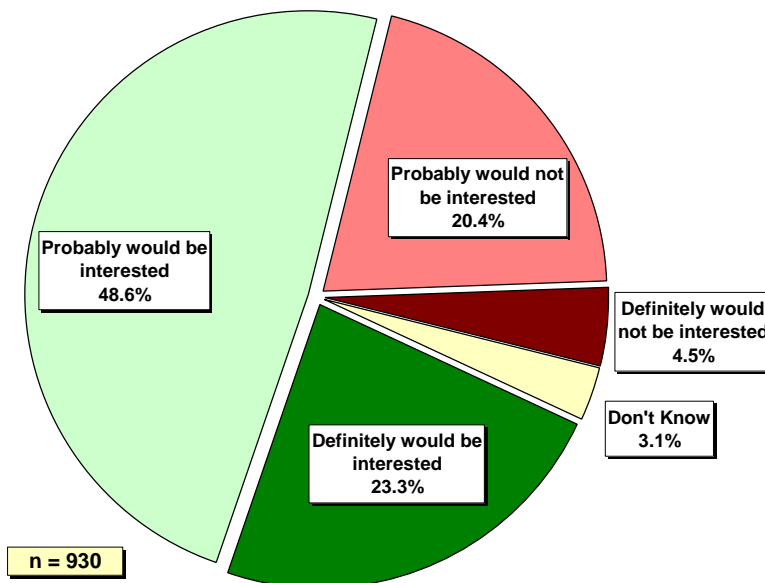
Figure 27: Q32) In Which Season Would You Return to Montana?



Summer was the most popular time for future travel, mentioned by almost 60% of both travelers and non-travelers.

Fall and *Spring* also received a substantial number of mentions.

Figure 28: Q37) Interest in a Vacation Following the Lewis & Clark Trail



Almost three-quarters of all respondents said they would be *somewhat* or *very interested* in a vacation that followed the Lewis & Clark Trail.

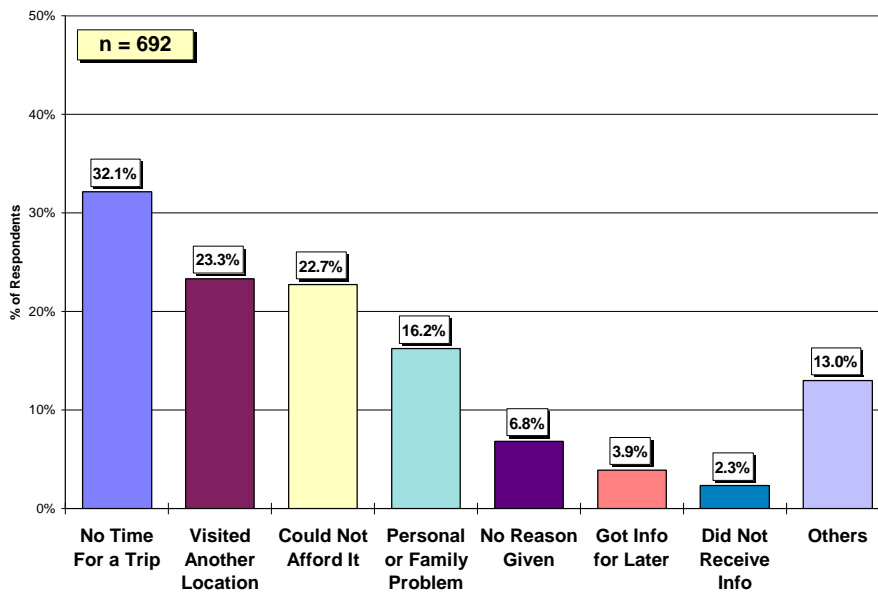
Those from the Distant PI states (Florida, New York, and Texas) were slightly more likely to be interested as those from nearby states.

NON-TRAVELERS PROFILE

In this section we examine the reasons given for not traveling to Montana.

NO TIME AND NO MONEY MEAN NO VACATION; THOSE WHO DID TRAVEL WENT ELSEWHERE

Figure 29: Q30) Reasons for Not Visiting Montana Last Year (multiple response)



About one-third of those who did not visit Montana said they had *no time for a trip*; another 23% said they *could not afford it*.

Almost one-quarter went elsewhere on a vacation and 16% cited "*Personal or Family Problems*" prevented them from traveling to Montana.

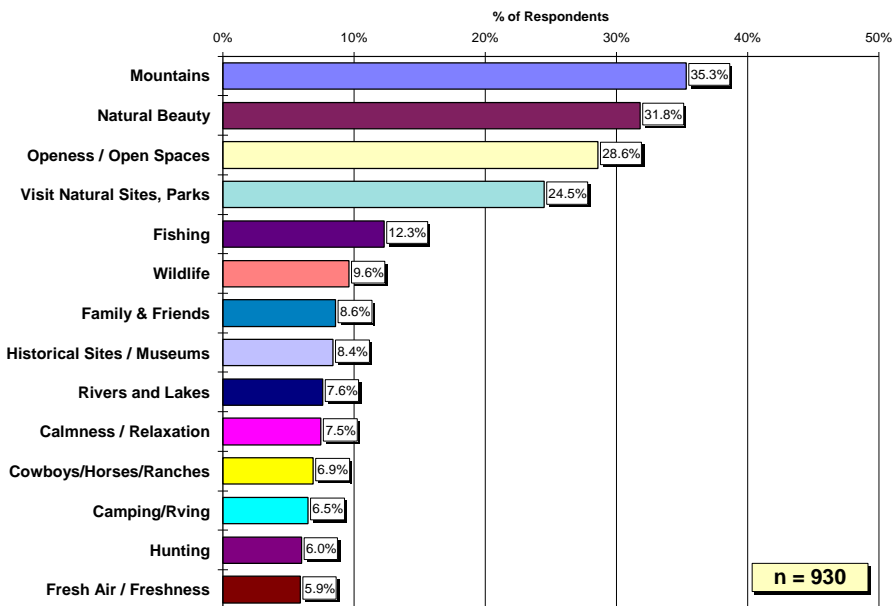
Four percent of respondents mentioned that they ordered the information for a trip later or next year. Just over 2% of all respondents gave "*I Did Not Receive the Travel Information*" as one of their reasons for not visiting.

Only 1% of all respondents said that "*Montana was Not Attractive or Interesting*" and just 1% said that "*Airline Costs Were Too Expensive*" as reasons for not visiting.

WHEN YOU THINK OF AN MONTANA VACATION, WHAT COMES TO MIND? FOR MOST, IT'S MOUNTAINS

In this section we look at the responses to the top of mind awareness question about Montana vacations.

Figure 30: Q15) When You Think of a Montana Vacation, What Comes to Mind?



Both travelers and non-travelers gave similar answers to this multiple-response question; and the answers given most often were:

- *Mountains* (35%),
- *Natural Beauty* (32%),
- *Openness and Open Spaces* (29%), and
- *Visiting Natural Sites and Parks*. (25%).

It is the last of these answers that there was some dissimilarity. Those who did travel to Montana and those whose primary destination was Montana were more likely to mention *Visiting Natural Sites and Parks* than those who did not visit or whose primary destination was somewhere else.

Most of the recreational-type answers received few mentions – the ones mentioned most often were *fishing* (12%), *rodeos/horses/horseback riding* (7%), *camping* (7%), and *hunting* (6%). The second category above (rodeos/horses/etc.) was added after a review of the open-ended answers.

CONCLUSIONS

The Per-Inquiry advertising campaign proved its worth in both conversion rate and economic impact to the state. The Minnesota Network group had the best conversion rate, but the cost per traveler was nearly double that of the cost per traveler for PI travelers. Per-Inquiry advertising also provided a better return per dollar over ad costs than the network ads.

Given the limitations of travel to Montana – mainly time, expense, and distance – the conversion rates seen in this study can be considered very good. Those that did not travel to Montana cited a lack of time, lack of money, or other personal problems that prevented a Montana vacation. For the most part, they did not go anywhere else, either.

One mystery was the recollection of receiving the travel information material. Those in nearby states (including Minnesota) were more likely to say they remembered receiving the travel information they requested than those in Florida, New York, and Texas.

PROFILE OF THE “TYPICAL” MONTANA VACATIONER

To summarize the demographic, psychographic, and economic profile of the “typical” respondent who visited Montana:

- ◆ Travelers made their decision to travel **before** ordering travel information.
- ◆ The information helped to reinforce their decision to travel to Montana, and in some cases respondents said the information resulted in a longer visit.
- ◆ The majority fit the Active Outdoor psychographic profile.
- ◆ The majority say that Montana was their **primary** destination.
- ◆ There are mostly two adults in the traveling party, 45 years of age or older, with moderate income
- ◆ They usually have no children in the traveling party.
- ◆ Summer visits were most likely.
- ◆ The average stay included six overnights, usually in a motel or hotel.
- ◆ The average amount spent per day (excluding travel costs) was about \$138; the average amount spent per trip was almost \$800 per traveling party.
- ◆ Those who had made previous trips to Montana in the past five years were more likely to have visited Montana this past year.
- ◆ Most travelers were very satisfied with their most recent visit and are very likely to return, probably in the next two years.

- ◆ Both travelers and non-travelers showed an interest in a future trip that followed the Lewis & Clark Trail.

APPENDICES

APPENDIX A – OPEN-ENDED ANSWERS FROM THE SURVEY

Q2 – What source prompted you to request this information? (How did you obtain the address or phone number?)

20059 Advertising from the state bureau of tourism
30003 Requested through Montana tourism office
30046 Chamber of commerce
30056 Travel teacher
30084 Chamber of commerce - called capitol of Montana - called information
40018 Contacted state to get info
40072 Called directory assistance
50039 Came in mail (postcard)
60048 Phone
110019 Pamphlet.
120004 Camping directory.
160068 Dept. Of commerce
190024 Previous Montana brochure
190078 Called chamber of commerce
260015 Called information
360001 Brochure from a sportsman's show.

Q15 – When you think of a Montana vacation, what thoughts come to mind? (up to five answers accepted)

Other answer is first answer

10010 Poor mosquitoes high gas prices working on road to get to Yellowstone
20057 The people and their attitudes
30030 Birthplace
30061 Lots of driving
30082 Great Falls and Billings
50072 General tour.
50112 Missoula
50116 Moving there.
60032 Speed limit.
60054 Hot springs
70000 Specific cities
100014 No speed limit highways are good
120006 Opposite of New York.
120029 Real estate.
120038 Speeding
130110 Cold!
140018 A lot of property
140074 Shot at in Glacier National Park
140113 Buy of piece of land
160036 Just moved from India, only know about CA, FL, and NY
190017 Near Weibiel
220018 Long drive
220094 Away from home
220095 Billings
270040 Warmer weather.
280002 Difference in weather no speed limit

Q15 – Other answer is second answer

40000 Generally good time
50007 Freedom geologically
50044 Wheat fields.
50061 Outdoors
50080 Big canyon
50134 Green fields
60007 People politics.
60013 Towns.
60105 Lodging.
70020 Indian reservation
70026 Shriner hospitals mines in Butte
100021 Blackfoot reservation
110041 Friendliness
120040 Great Falls.
120041 Clean.
140004 Pretty sky
140068 Unlimited speed limit
140110 Invited by governor
150013 People and food
150015 Weather is always pretty good
160071 Weather, living conditions, people
160100 Snow
170014 Cool summers
190066 Snow in the summer!!
190083 Nice people
270041 Good weather.
310026 Trees
310028 Pow wows
360000 Ghost towns

Q15 – Other answer is third answer

40004 Highway 2 for the beautiful scenery. we weren't satisfied with the info we received.
Just a little booklet on the motels available but nothing on the state of Montana sites.
40022 Craft fairs, antique-ing
40034 Unique travel speeds
40035 Snow in the summer!!
40052 Western atmosphere
50039 Dry weather
50111 No speed limit
50117 Info about Blackfoot Indians.
60005 Fun.
60014 Exploring
60053 Friendly people
60087 Friendly people; Indians.
70019 Cool weather
110011 Lots of bales of hay.
110017 Nice weather.
120003 Food
160024 Reservations
190015 Kalispell
190091 Marlborough man
220124 Retirement living
270053 Girls

Q15 – Other answer is fourth answer

50076 Speed limit.
90067 People as well
160003 Western atmosphere.
160057 Missoula
190055 Sheep
260012 Shopping
270066 Indians
270096 Nice people

Q15 – Other answer is fifth answer

40010 Great Northern RR cafe in Kalispell, brewery also Hungry Horse Dam. We wouldn't have done most of the tourist stuff without the pamphlets,
140052 Change of weather
190030 Friendly people good roads shopping
260045 People down home

**Q20 – Now I would like to ask a few questions about your MOST RECENT trip to Montana...
What was the PRIMARY purpose of this trip?**

30084 Been there before
50039 Looking to relocate to Montana
70015 Go to camp.
70026 Never been there !!
80001 Honeymoon
140004 Had never been there before
150007 Relocation
160016 Wanted to ride on a train, 25th wedding anniversary
190065 Looking for a place to live
190066 Genealogy research
250009 To go look for some land. (probe) As I told you I am retired and I just want to get into some bigger spaces.

Q26 – What accommodations did you use while visiting Montana on your most recent trip?

10001 Cabins
40021 Lodges
40023 Ranch 320 log cabin
40034 Cabin at Glacier Natl. Park
40061 Just anywhere we stopped
50076 Lodges
110011 Truck stop
140119 Rented a home
160075 Lodge
180047 Lodges
190043 Slept in car
190049 Park cabins
190068 Cabin at Glacier Natl. Park
310009 Cabins

Q30 – Why did you choose not to visit Montana during the last year?

(If Q6 indicated they did not take a vacation, the question reads): Why did you not take any trips during the last year?

30088 Family came to their state
40036 Don't know anyone in Montana
90085 No place to stay.
110004 Because they came to see us
140027 Not good air to breathe here
150003 Bought a boat and decided to stay.
150028 No one to travel with
160012 Her sister didn't give us any encouragement to come to Lewiston
160055 Couldn't get through Yellowstone two Octobers ago, road closed due to snow
190023 Did not have anyone to travel with - must have a companion, would love to live there

Q37 – Montana has the largest number of identified Lewis & Clark historic sites in the nation. How interested would you be in a vacation that followed the Lewis & Clark Trail?

60102 NOTE: It would depend on how physically strenuous it would be.

APPENDIX B – CALL OUTCOMES

The data described in this report were collected from September 9 through 24, 1997. Interviewing was conducted weekdays from 5:30 p.m. until 9:15 p.m., Saturdays from 10:00 a.m. until 4:00 p.m., and Sundays from 2:00 p.m. until 8:00 p.m. (all local time). A total of 5,502 dialings were made to complete 930 interviews. The average length of the interview was about six minutes.

About one-third of all calls produced contact, with over half of those calls resulting in a completed interview. Slightly more than half of all calls produced no contact with the majority of those being calls to an answering machine.

Call Outcome	Number of Dialings	Percent of Sub-Category	PERCENT OF ALL DIALINGS
TOTAL DIALINGS	5,502		
CONTACT	1,714		31.2%
Not complete:			
Initial Refusal	391	22.8%	7.1%
Did Not Qualify *	364	21.2%	6.6%
Mid-Termination	29	1.7%	0.5%
Completed interview	930	54.3%	16.9%
Number of calls resulting in a scheduled call back	897		16.3%
NO CONTACT	2,891		52.5%
No answer / busy	1,207	41.8%	21.9%
Answering Machine	1,400	48.4%	25.4%
Disconnected / Non working number	284	9.8%	5.2%

* reason for disqualification include those who ordered travel information for a school project or other non-travel reasons, ordering travel information for someone else, or a respondent indicating that they did not request any travel information.

APPENDIX C – QUESTIONNAIRE

INTRO

Hello, my name is _____ of Clearwater Research, a professional marketing research firm. Our records show that you or someone in your household requested information about traveling to Montana – was it you?

[ASCERTAIN CORRECT PERSON, OR SCHEDULE A CALLBACK]

I would like to ask you a few questions about your request -- Is now a convenient time?

YES - PRESS '1' TO CONTINUE

NO - <CTRL><END> TO SCHEDULE A CALLBACK OR TERMINATE.

Q1

Do you recall requesting any information about traveling to Montana, either by mail or by calling an 800 phone number?

- 1 YES
 - 2 NO
 - 3 DON'T KNOW / REFUSED -- **RE-ASK BEFORE CHOOSING**
-

[if answer = 1 continue, otherwise thank and terminate]

Q2

What source prompted you to request this information?

IF NECESSARY: **How did you obtain the address or phone number?**

- 1 MAGAZINE ADVERTISEMENT
 - 2 TELEVISION ADVERTISEMENT
 - 3 NUMBER WAS LISTED IN TOURBOOK / ATLAS
 - 4 FILLED OUT READER INFORMATION CARD
 - 5 MAGAZINE ARTICLE
 - 6 NEWSPAPER ARTICLE
 - 7 FRIEND OR RELATIVE SUGGESTED
 - 8 INTERNET SITE
 - 9 OTHER (SPECIFY)
 - 10 DON'T KNOW / CAN'T REMEMBER
-

Q3

Did you receive the Montana Tourism information you requested?

- 1 YES
 - 2 NO
 - 3 DON'T KNOW / NO ANSWER
-

Q4

During the past year, did you take any trips outside of your home state of 200 miles or more?

- 1 YES
 - 2 NO
 - 3 DON'T KNOW / NO ANSWER
-

[if answer = 1 go to Q5 else "NO GO" skip to Q15]

Q5

Did you travel to or through Montana?

- 1 YES
 - 2 NO
 - 3 DON'T KNOW / NO ANSWER
-

[if answer = 1 go to Q6 else "NO GO" skip to Q15]

Q6

Was Montana your PRIMARY vacation destination?

- 1 YES
 - 2 NO
 - 3 DON'T KNOW / NO ANSWER
-

Q7

Did you decide to travel to Montana before or after you requested the travel information?

- 1 BEFORE
 - 2 AFTER
 - 3 DON'T KNOW / NO ANSWER
-

[if answer = 1 and Q3 = 1 go to Q10]

[if answer <> 1 and Q3 = 1 go to Q9]

[if answer in Q3 not = 1 go to Q15]

otherwise, go to Q8

Q8

Did you decide to travel to Montana before or after you received the information you requested?

- 1 BEFORE
 - 2 AFTER
 - 3 DON'T KNOW / NO ANSWER
-

Q9

How much or little influence did the information you received have on your decision to travel to Montana?

Would you say it had . . . ?

- 1 A great deal of influence
 - 2 Some influence
 - 3 Very little influence, or
 - 4 No influence at all
 - 5 DON'T KNOW / NO ANSWER
-

Q10

Did the information you received influence the planning of the length of your stay for your travel to Montana?

YES – How did it influence the length of your stay in Montana?

- 1 HAD AN EFFECT, LENGTHENED STAY IN MONTANA
 - 2 HAD AN EFFECT, SHORTENED STAY IN MONTANA
 - 3 NO – THERE WAS NO EFFECT
 - 4 DON'T KNOW / NO ANSWER
-

Q15

When you think of a Montana vacation, what thoughts come to mind?

(DO NOT READ -- SELECT UP TO 5)

CAMPING / RVING	RECREATIONAL PURSUITS (general)
HIKING or WALKING	VISIT HISTORICAL SITES / HISTORY / MUSEUMS
FISHING	NATURAL BEAUTY / SCENERY
HUNTING	VISIT NATURAL SITES, PARKS
MOUNTAINS	OPENNESS / OPEN SPACES
RIVERS & LAKES	WILDLIFE
WATER-BASED ACTIVITIES	CALMNESS / RELAX / LESS TRAFFIC &/or STRESS
SPECIAL EVENTS	FRESH AIR, FRESHNESS
BIKING	SENSE OF ADVENTURE
PHOTOGRAPHY	SKIING or SNOWBOARDING
SNOWMOBILING	WINTER SPORTS (general)
FAMILY & FRIENDS	OTHER – Specify:
GAMBLING	NO OTHERS / NOTHING / DON'T KNOW / NO ANSWER

IF "NO GO" in Q4 or Q5 SKIP to Q30

Q20

Now I would like to ask a few questions about your MOST RECENT trip to Montana...

What was the PRIMARY purpose of this trip?
(DO NOT READ -- SELECT BEST ANSWER)

- 1 RECREATION & ACTIVITIES
 - 2 SIGHTSEEING
 - 3 RELAXATION & ESCAPE
 - 4 VISIT HISTORICAL SITES / HISTORY MUSEUM
 - 5 VISIT FRIEND OR RELATIVE
 - 6 BUSINESS, CONFERENCE, OR CONVENTIONS
 - 7 COMBINATION OF BUSINESS AND PLEASURE
 - 8 PERSONAL, SUCH AS FAMILY AFFAIRS / MEDICAL / FAMILY REUNION / WEDDING
 - 9 JUST PASSING THROUGH
 - 10 OTHER (SPECIFY)
 - 11 DON'T KNOW / NO ANSWER
-

Q21

In which season did you visit Montana on your most recent trip?

- 1 WINTER
 - 2 SPRING
 - 3 SUMMER
 - 4 FALL
 - 5 DON'T KNOW / REFUSED
-

Q22

What form of transportation was used to visit Montana?

- 1 AIR
 - 2 DRIVE BY CAR
 - 3 BUS
 - 4 TRAIN
 - 5 OTHER (SPECIFY)
 - 6 DON'T KNOW / NO ANSWER
-

Q23

How many adults 18 years of age or older were in your immediate traveling party on your most recent trip?

ENTER NUMBER OF ADULTS: THEN PRESS <ENTER>

8 = 8 OR MORE

9 = DON'T KNOW / NO ANSWER

Q24

How many children 17 years of age or younger were in your immediate traveling party on your most recent trip?

ENTER NUMBER OF CHILDREN: THEN PRESS <ENTER>

8 = 8 OR MORE

9 = DON'T KNOW / NO ANSWER

Q25

How many nights (OVERNIGHT) did you stay in Montana?

ENTER NUMBER OF NIGHTS: THEN PRESS <ENTER>

0 = NO OVERNIGHT STAYS

99 = DON'T KNOW / NO ANSWER

Q26

What accommodations did you use while visiting Montana on your most recent trip?

(DO NOT READ -- SELECT UP TO 5)

PROBE: Any others?

- 1 HOTEL OR MOTEL
 - 2 BED AND BREAKFAST
 - 3 RESORT
 - 4 RENTAL CONDOMINIUM OR HOME
 - 5 GUEST RANCH
 - 6 CAMPGROUND
 - 7 RV PARK
 - 8 HOME OF FRIENDS OR RELATIVES
 - 9 YOUR OWN VACATION OR SECOND HOME
 - 10 OTHER ACCOMMODATIONS (SPECIFY)
 - 11 NONE / NO OTHERS
 - 12 DON'T KNOW / NO ANSWER
-

Q27

While you were in Montana, about how much, on average, did you and your immediate traveling party spend **per day**. Please include lodging, food, purchases in stores, entertainment, and recreation. But, DO NOT include costs of traveling to Montana.

ENTER AMOUNT SPENT EACH DAY: THEN PRESS <ENTER>

99999 = DON'T KNOW / NO ANSWER

(CONFIRM AMOUNT IS "PER DAY" AVERAGE – Probe:

"...and this amount: _____, is the per day average for all members of your traveling party?"

Q28

Overall, how satisfied were you with your trip to Montana?

Would you say you were . . . ?

- 1 Very satisfied
- 2 Somewhat satisfied
- 3 Neither satisfied nor dissatisfied
- 4 Somewhat dissatisfied, or
- 5 Very dissatisfied
- 6 DON'T KNOW / NO ANSWER

Q29

How likely would you be to take another trip to Montana?

Would you say you would be . . . ?

- 1 Very likely
- 2 Somewhat likely
- 3 Neither likely nor unlikely
- 4 Somewhat unlikely, or
- 5 Very unlikely
- 6 DON'T KNOW / NO ANSWER

[skip to Q31]

Q30

Why did you choose not to visit Montana during the last year?

(IF Q6 > 1 question reads): Why did you not take any trips during the last year?

(DO NOT READ -- SELECT UP TO 5)

PROBE: What else?

**THESE ARE NOT READ
TO THE RESPONDENT**

- 1 AIRLINE COSTS TOO EXPENSIVE
 - 2 COULD NOT AFFORD TRIP / OTHER FINANCIAL REASON
 - 3 DID NOT RECEIVE THE INFORMATION ABOUT MONTANA
 - 4 NO TIME FOR A TRIP
 - 5 PERSONAL OR FAMILY ILLNESS / PROBLEM
 - 6 MONTANA NOT ATTRACTIVE / INTERESTING
 - 7 VISITED ANOTHER LOCATION INSTEAD OF MONTANA
 - 8 OTHER (SPECIFY)
 - 9 NO REASON / NO OTHERS
 - 10 DON'T KNOW / NO ANSWER
-

[everyone rejoins here]

Q31

In the next two years would you say you . . .

- 1 Definitely will visit Montana
 - 2 Probably will visit
 - 3 Probably will not visit
 - 4 Definitely will not visit Montana
 - 5 DON'T KNOW / UNSURE / NO ANSWER
-

IF 1 or 2 go to Q32, else Q33

Q32

In which season would you return to Montana?

- 1 WINTER
 - 2 SPRING
 - 3 SUMMER
 - 4 FALL
 - 5 DON'T KNOW / REFUSED
-

Q33

In the past five years, how many times have you been to Montana?

ENTER NUMBER OF TIMES: THEN PRESS <ENTER>
99 = DON'T KNOW / NO ANSWER

Q34

When you take a vacation out-of-state, is your primary purpose to participate in an active outdoor vacation? Examples of outdoor vacations would include, but are not limited to, hiking, fishing, rafting, biking, backpacking, horseback riding or horsepacking, golfing, skiing, snowmobiling, hunting, or any other recreational activities...

- 1 YES -- PRIMARY PURPOSE IS TO PARTICIPATE IN AN ACTIVE OUTDOOR VACATION
- 2 NO -- PRIMARY PURPOSE IS SOMETHING ELSE

[if answer = 1 go to Q36 else go to Q35]

Q35

When you take a vacation out-of-state, is your primary purpose to participate in sightseeing, including driving through scenery, hiking, visiting national parks and historic sites, and seeing other attractions?

- 1 YES -- PRIMARY PURPOSE IS TO PARTICIPATE IN SIGHTSEEING
- 2 NO -- PRIMARY PURPOSE IS STILL SOMETHING ELSE

Q36

What kind of vacation best describes the experience you are looking for – would you say you were looking for a vacation that provides you with relaxation and adventure in a natural setting, or a vacation that provides you with relaxation and a variety of activities?

- 1 RELAXATION and ADVENTURE / NATURAL SETTING
- 2 RELAXATION and VARIETY OF ACTIVITIES

*Summary of Q34 - Q36: If Q35 = 1 and age>55 [Active Mature]
 If Q36 = 1 [Active Outdoors]
 If Q36 = 2 [Traditional Family]
 Else: Some other classification*

Q37

Montana has the largest number of identified Lewis & Clark historic sites in the nation. How interested would you be in a vacation that followed the Lewis & Clark Trail? Would you say you . . . ?

- 1 Definitely would be interested
 - 2 Probably would be interested
 - 3 Probably would not be interested
 - 4 Definitely would not be interested
 - 5 DON'T KNOW / UNSURE / NO ANSWER / WHO IS LEWIS AND CLARK?
- [there was an on-screen reminder for interviewers describing who Lewis & Clark were]*
-

Q50

Finally, I have just a few questions for categorical purposes.
I need to ask and not guess -- are you a man or a woman?

- 1 MALE
 - 2 FEMALE
 - 3 REFUSED
-

Q51

How many children do you have living at home?

ENTER NUMBER OF CHILDREN: THEN PRESS <ENTER>

8 = 8 OR MORE
9 = DON'T KNOW / NO ANSWER

Q52

What is your age, please?

ENTER AGE: THEN PRESS <ENTER>
99 = DON'T KNOW / NO ANSWER

Q53

What is the highest level of education you have completed?

(DO NOT READ)

- 1 LESS THAN HIGH SCHOOL
 - 2 HIGH SCHOOL
 - 3 SOME COLLEGE / TECHNICAL SCHOOL
 - 4 COLLEGE GRADUATE
 - 5 GRADUATE SCHOOL
 - 6 DON'T KNOW / NO ANSWER
-

Q54

And finally, please stop me when I read the range that comes closest to your total annual household income. . .

- 1 under \$20,000
 - 2 \$20,000 to \$39,999
 - 3 \$40,000 to \$59,999
 - 4 \$60,000 to \$79,999
 - 5 \$80,000 to \$99,999
 - 6 \$100,000 to \$120,000
 - 7 More than \$120,000
 - 8 DON'T KNOW / NO ANSWER
-

ENDQ

Those are all of my questions. Thank you for your time!
